

9 December 1958

MEMORANDUM FOR THE RECORD

SUBJECT: SHORT SUPPLY OF Forms 45 in Stock Rooms

STAT 1. Checked with [ ] (C/BSO) today and he advises that he only has four copies of Form 45 on hand and has several orders waiting to be filled. He is in constant touch with the Warehouse and will be advised as soon as they are available.

STAT 2. I then called [ ] (D/Log) who is going to check on the Printing and request a Priority on top of the PRIORITY which was already on the job. She will advise.

3. We had previously been informed that the forms would be available to the Supply Rooms on Friday, 5 December 1958.

STAT 4. We are at a loss to understand why and how the original order of 60,000 was consumed so rapidly. [ ] plans to try to limit future withdrawals from the BSO's in an informal manner - and when an extremely large request comes in they will question it, and if necessary refer the request to either ARD/OP or the C/BSO.

STAT

**DIRECTIONS FOR COMPLETING FORM 45, FITNESS REPORT****GENERAL****1. POLICY**

It is Organization policy to inform employees of the effectiveness of their work performance. Organization policy also requires that supervisors record at least once each year their opinions and evaluations of the work performance of employees under their jurisdiction. Evaluations will also be made whenever it is necessary or desirable to provide Organization management with information which may be pertinent to future personnel actions affecting these individuals. Regulation No. 20-370 outlines policies concerning the requirements for submitting initial, annual, reassignment and special reports, showing the report to the employee and appeals procedure. The Fitness Report, Form 45, is used to record evaluations. However, an evaluation in memorandum form may be substituted for Form 45 for employees in Grades GS-14 and above.

**2. SUBMISSION**

The Fitness Report will be submitted in triplicate to the Head of the Career Service concerned. The Head of the Career Service will retain one copy and will forward the original and other copy to the Office of Personnel.

**3. INITIAL REPORT**

A Fitness Report will be prepared for each employee as of nine months after his entrance on duty with the Organization. An initial report need not be made when a Fitness Report has already been made for some other purpose within 90 days prior to the due date of the initial report. The initial report is of particular importance in providing a record of the supervisor's evaluation of the employee before the employee has completed his twelve-month trial period. An initial report may be deferred for a period not to exceed 30 days beyond the due date to provide the supervisor with additional time to evaluate an employee who has been under his jurisdiction for less than 90 days.

**4. ANNUAL REPORT**

A Fitness Report will be prepared annually for each employee, except when a Fitness Report has been made for some other purpose within 90 days prior to the due date of the annual report. An annual report may be deferred until the employee has been under the jurisdiction of the supervisor for 90 days.

**SCHEDULE FOR SUBMISSION OF ANNUAL REPORTS**

<u>GRADES</u>	<u>FOR PERIOD ENDING</u>	<u>DUE IN OFFICE OF PERSONNEL</u>	
		<u>FROM HEADQUARTERS</u>	<u>FROM FIELD</u>
GS-1 through GS-5	31 March	30 April	31 May
GS-6 through GS-8	30 June	31 July	31 August
GS-9 through GS-11	30 September	31 October	30 November
GS-12 and GS-13	31 December	31 January	28 February
GS-14 and above	31 March	30 April	31 May

**5. REASSIGNMENT REPORT**

A Fitness Report will be prepared whenever both the Immediate Supervisor of the employee and the Reviewing Official are changed by the reassignment of the employee. For the purpose of fitness reporting "Immediate Supervisor"

refers to the official who prepares and signs the Fitness Report of the employee concerned. When the supervisor is reassigned and has numerous reassignment reports to prepare he need complete only SECTION B of the Fitness Report.

**DRAFT**

18 JAN 1962

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SECTION A - GENERAL

The items of this section should be completed by the appropriate administrative or personnel officer. Special instructions for completing or omitting items of this part of the report should be carefully observed on Field Transmittal - Fitness Report Form 45a.

SECTION B - EVALUATION OF PERFORMANCE OF SPECIFIC DUTIES AND OF OVERALL PERFORMANCE

Rating Scale

The rating scale as set forth in this section in Form 45, Fitness Report, is to be used to reflect evaluation of Specific Duties and of Overall Performance. In making your selection of the appropriate adjective evaluation for Section II and in completion of the narrative in Section III the following factors should be considered:

Productivity	Mobility
Decisiveness	Records Discipline
Cooperativeness	Versatility
Initiative	Cost Consciousness
Resourcefulness	Security Consciousness
Supervisory Effectiveness	
Ability to Think Clearly	
Acceptance of Responsibility	
Effectiveness of Written Expression	
Effectiveness of Oral Expression	

Rating of Performance of Specific Duties

In this section the supervisor will list in order of importance the most significant duties the employee has performed during the rating period. Each duty shall be described in sufficient detail to provide information which may be useful later in considering individuals for other assignments. Your evaluation should be recorded by entering the appropriate letter in the box provided for your evaluation of each duty.

Rating of Overall Performance in Current Position

In making this rating the supervisor should take into account the employee's conduct on the job as well as his performance on all specific duties. Each supervisor will weigh these factors in his own mind so as to arrive at a rating which will reflect an employee's overall value on the job.

SECTION C - NARRATIVE DESCRIPTION OF MANNER OF JOB PERFORMANCE

In this section the supervisor describes the employee's demonstrated abilities or deficiencies in the performance of his present job. This may include comments regarding a specific duty by direct reference to that duty. Any relatively high or low ratings in Section II should be explained or amplified by supporting statements. In addition, the supervisor may comment here on any extenuating circumstances which affects the productivity and effectiveness of the employee. Comment should be made here on the relative performance of the person being rated with other people known to the rater doing comparable work.

SECTION D - CERTIFICATION AND COMMENTS

The person being rated may attach to his fitness report a memorandum concerning any part of the report. The memorandum will be attached to the original for inclusion in the Official Personnel Folder.

Reviewing officials are responsible for assuring that all reports made by rating officials under their jurisdiction are consistent and reflect uniform standards of reporting. Through counseling and supervision of rating officials, the reviewing officials can play a major role in improving the operation of the Fitness Report program.

In addition, reviewing officials should as a matter of practice submit a brief narrative evaluation of the performance and potential of the individual being rated, noting the degree to which he is personally familiar with the individual and his work. Even though the reviewing official may not be able to evaluate the individual from firsthand experience with him, it is likely that the reviewing official may be able to contribute useful information concerning future utilization or training of the individual based on the review of his record of performance and assignments.

Some disagreement between the supervisor and the reviewing official when preparing evaluations is not unusual. In a situation where there are significant discrepancies between the evaluation of the supervisor and the reviewing official, the Director of Personnel will discuss the report with the Head of the Employee's Career Service and the employee will be informed of his standing and prospects by the Head of his Career Service.

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